Budgeting for Equity

Promising Practices, Examples, and Resources from the GARE Network

The GARE Approach

GARE

Visualize

What a just, multiracial society looks like, and what that change means. If we can eliminate the significant racial disparities that currently exist.

Normalize

A shared understanding of the terms and definitions that allow us to speak about race and a shared analysis of racial inequities that allow us to demonstrate the urgency of the problem and prioritize racially equitable solutions.
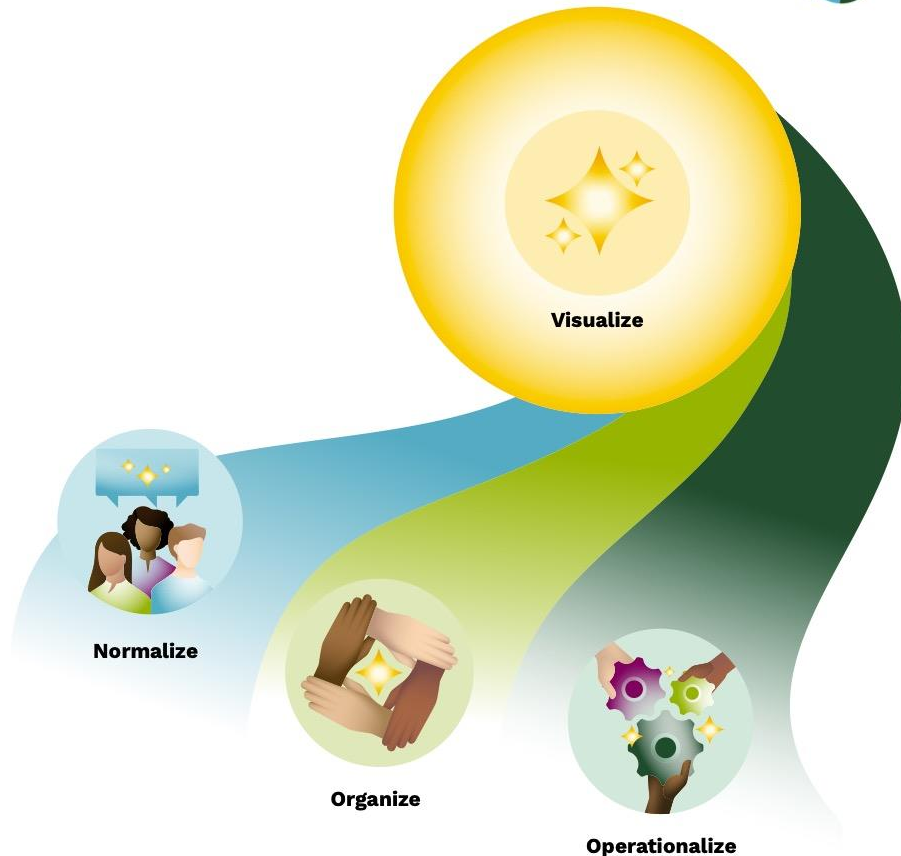
Organize

To achieve racial equity, local and regional government must work both internally and externally with a network of partners: institutions, business, education, philanthropy, among others, and center the work with communities of color.

Operationalize

Tools must be used to change the policies, procedures, and practices that are perpetuating inequities, as well as used in the development of new policies and programs. Data obtained at the programmatic and community levels must demonstrate measured results.

Visualize

Normalize

Organize

Operationalize

Why Focus on Budget Equity?

Budgets are a statement of an institution's goals and should reflect the values and aspirations of the communities that make up a state, county, or city.

Using a targeted universalism approach, we can **identify universal goals** and the indicators that reflect thriving communities, dig into **disaggregated data** to identify those communities that aren't experiencing desired outcomes, and **work alongside those communities** to identify and implement strategies to improve those outcomes.

Budgets are key policy documents where departments/agencies can explicitly name goals and indicators and track outcomes using a racial equity tool that asks the core questions: *Who benefits? Who is burdened? Is anyone better off?* The budget process, with the discussions, deliberations and decisions it entails, is a key point of intervention to advance racial equity.

Promising Practices

Many budget equity tools shared by GARE network practitioners have been developed by racial equity core teams consisting of staff from across the breadth and depth of the jurisdiction.

Frequently, these teams operate off a charter or policy mandate from an elected or appointed body. Sometimes, these activities are coordinated by a centralized racial equity office or jurisdiction-wide role with subject matter expertise.

Disaggregated Data

Equity Analysis

Transparency & Accountability

Organizing and Change Management

Disaggregated Data

Ensure that data is broken down so equity impacts can be recognized and assessed.

Request that data used to understand the well-being of communities and understand impact toward goals is broken down by race, gender, geography, and other core equity factors.

- Require disaggregated data in budget documents where impact of programs and services is presented.
- Create weighted scores that factor in key variables to operational and capital investment decisions.
- Develop and introduce alternative evaluation frameworks that value the lived experience of those government serves.

Equity Analysis

Integrate racial equity analysis early in the budget process.

Adding equity impact assessment to budget request documents helps elevate and prioritize equitable outcomes and reinforces that serving *all* communities is a core standard for government.

- Look at each stage of the budget process to identify key points of intervention
- Prioritize based on potential for impact and ability to systematize
- Provide training and technical support to departments/agencies as well as to budget analysts and decisionmakers

Transparency & Accountability

Clearly articulate how programs and services advance equity goals.

Constituents don't divide themselves up into lines of business, they experience the impacts of government investment or disinvestment in all areas of their lives from health, to education, to transportation, to upward mobility, and more.

- Engage in root cause analysis alongside those who are most adversely impacted
- Move to program-based budgeting to center goals rather than departments or line items
- Develop data dashboards to showcase how funds connect to community indicators

Organizing & Change Management

Balance idealism with pragmatism to bring people together and build trust.

The GARE Approach is an organizational change model that recognizes the importance of starting with a strong vision, dedicating time and care to normalizing racial equity concepts, and the importance of organizing across breadth and depth of government departments and roles.

- Look to those who shepherd the process and those impacted by it for ideas and engagement
- Identify champions who can act as catalysts in their departments/agencies
- Celebrate early wins and share stories of impact
- Build over time and establish that developing equity in budgets is an evolving practice

Examples in the GARE Online Community

Montgomery County, MD
[Operating Budget Equity Tool](#)

Salt Lake City, UT
[Program Scoring Matrix](#)

District of Columbia
[Racial Equity Budget Tool](#)

Santa Clara County, CA
[Budgeting for Equity Manual & Tool](#)

San Antonio, TX
[Budget Equity Tool](#)

Milwaukee County, WI
[Racial Equity in Budgeting](#)

City of Philadelphia, PA
[Budgeting for Racial Equity Reports](#)

City of Tacoma, WA
[Equity Index & Case Studies](#)

City of Madison, WI
[Equity in the Budget](#)

City of Dallas, TX
[Budgeting for Equity](#)

LA County, CA
[ARPA Budget Principles](#)

State of Washington
[HEAL Act Budgets & Funding Dashboard](#)

LA Metro, CA
[Budget Equity Assessment Tool](#)

More examples from GARE network practitioners are available in the [GARE Online Community's Network Library](#).

Selected Resources

GARE Resources | Publicly available toolkits and resource guides

GARE Online Community | A space for employees of GARE member jurisdictions who are engaged in racial equity work to connect, learn, and share ideas and resources.

Targeted Universalism Policy and Practice Primer | Othering & Belonging Institute has pulled together resources and explainer materials to support the use of this goal-oriented framework.

Social Equity in Budgeting: A Roadmap for Practitioners | 2024 article[Bartle and Rubin] providing an overview of lessons learned from local budget equity initiatives.

Equity in Public Budgeting: Lessons for the United States | 2023 article [Rubin and Bartle] identifying factors that have contributed to success in gender-responsive budgeting. Includes detailed analysis of intervention points at various phases of budget process.

Budgeting for Equity | 2023 report from the Government Finance Officers Association presents key tensions, lessons, and approaches.

Identifying Highest Impact Practices in Municipal Budgeting for Equity | 2023 ICMA article explores several points of intervention in budget process and policy along with key takeaways and examples.

Advancing Equity with the American Rescue Plan's Local Recovery Funds | 2024 The New School's Institute on Race, Power, and Political Economy published this report examining the impact of ARPA investment strategies.

Thank You!

See you in the GARE Online Community